

TIMELINES

Pacing and Planning



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Calendaring and Continuum

- Marketing Calendar
- Content Calendar
- Team Calendar



How do you at an elephant?.....

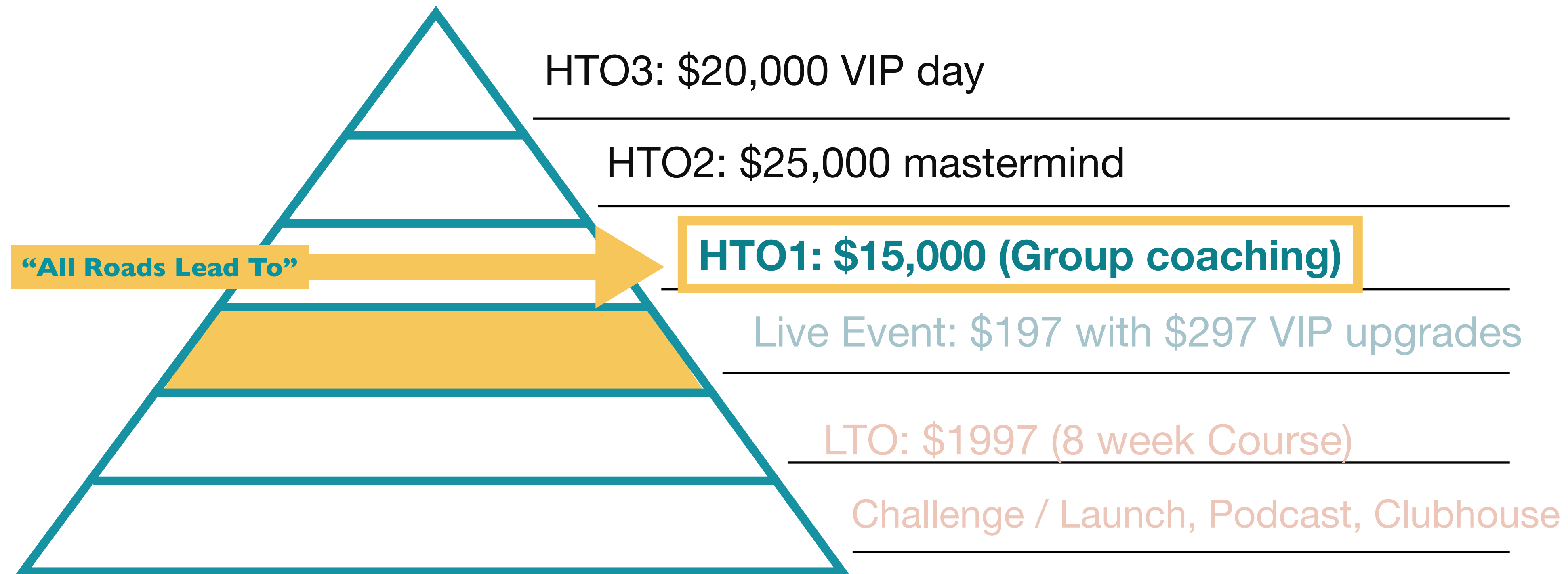
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Throughline

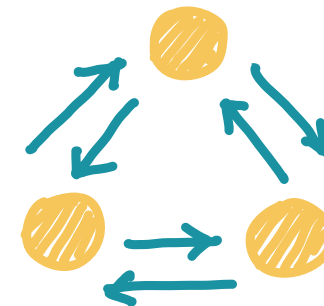
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BUSINESS-AT-A-GLANCE

DAILY, WEEKLY, MONTHLY, QUARTERLY, ANNUALLY



YOUR EVENT IS NOT A MOMENT IN TIME, IT'S PART OF A CONTINUUM



Strategy FIRST Throughline

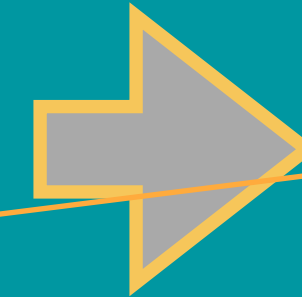
What is the ONE problem YOU solve?

Anchor

Big Why



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HTO

Design

**3 x 3
PAG**



**Daily
Themes**



Modules

Apply

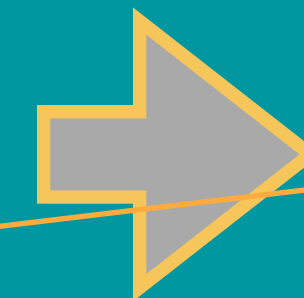
**Marketing
Copy/Video**



Challenge



**Course
Product**



**Live
Event**

Deliver

**3 x 3
PAG**



HTO



Deliver!

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MY HIGH TICKET OFFER

1. Health Event

4. Deep Dive Calls

2. Wealth Event

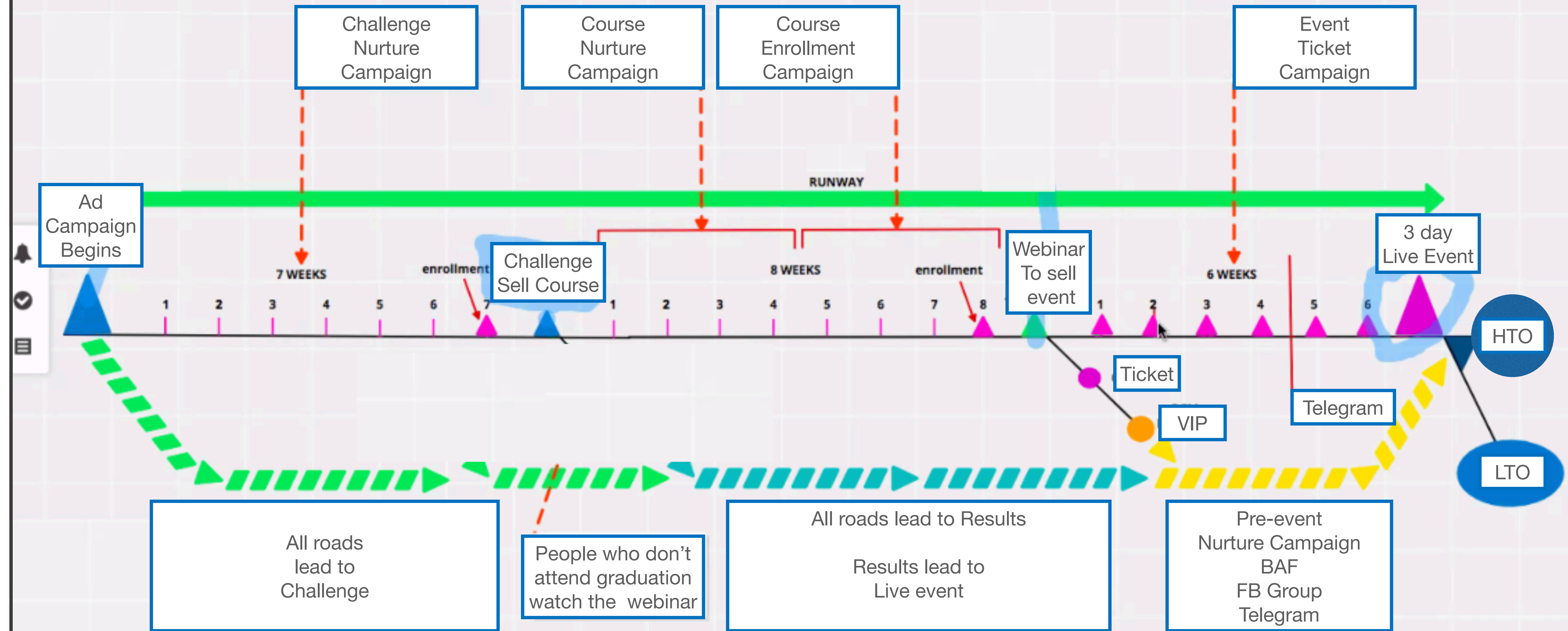
5. Q and A Calls

3. Happiness Event

6. Facebook Group



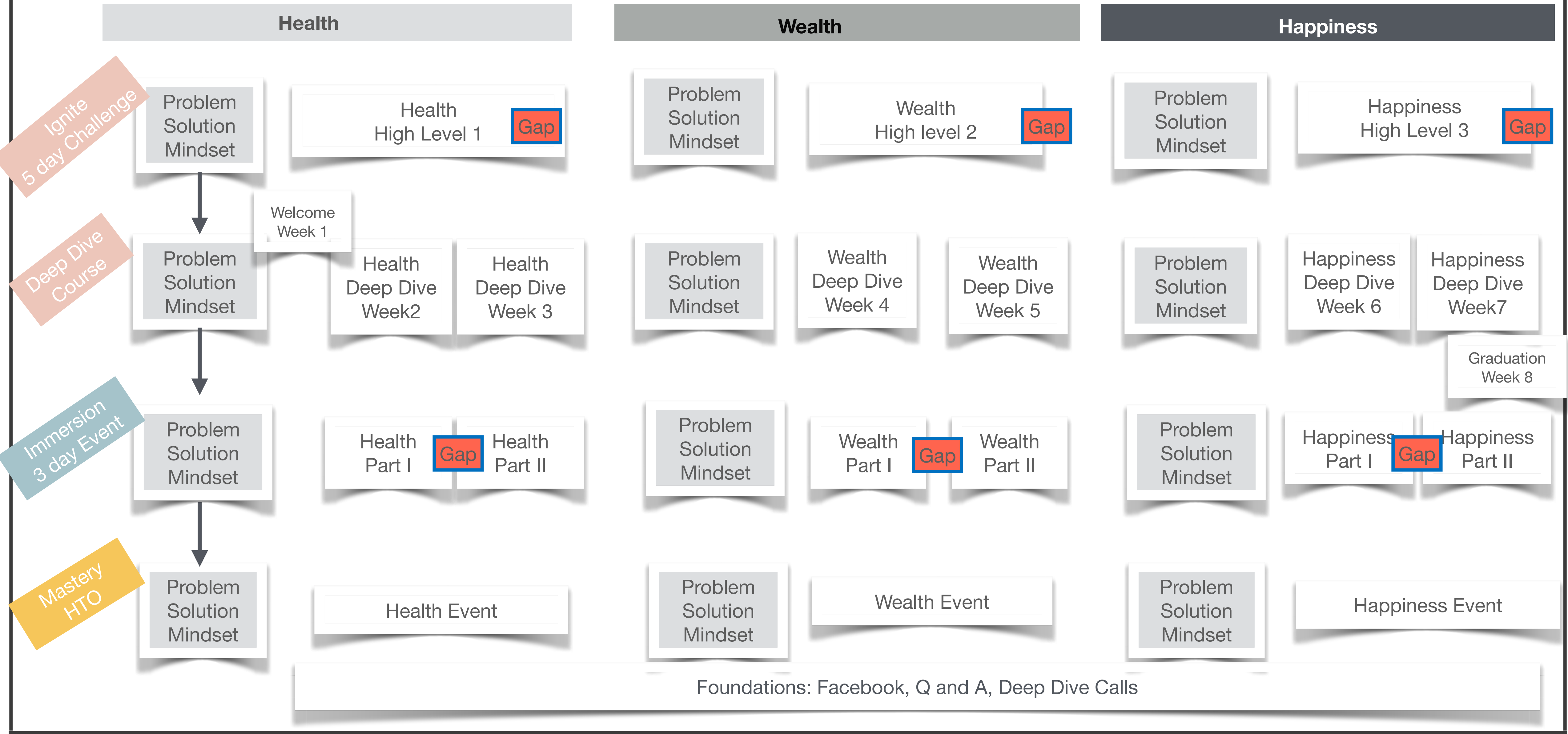
YEAR-AT-A-GLANCE



Enrollment never ends.
We are in the business of
Continuous re-enrollment.

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CONTENT-AT-A-GLANCE



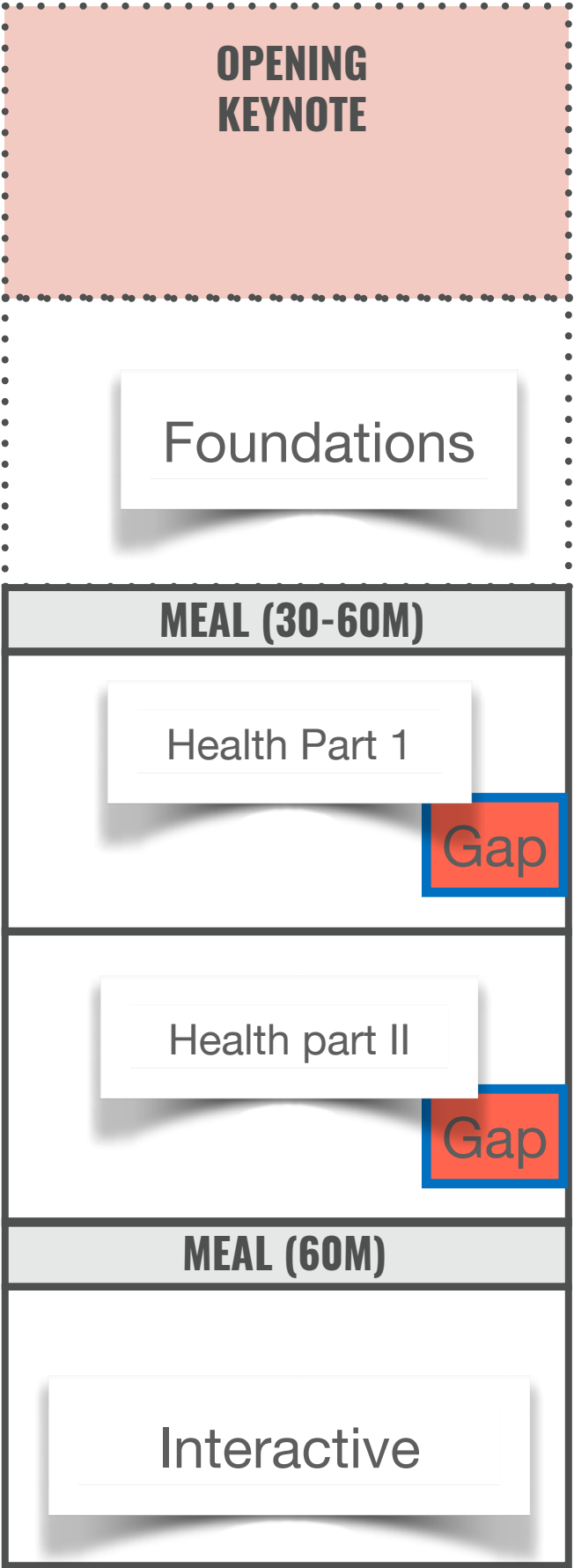
Each layer is a deeper dive into the same topic

MACRO VIEW

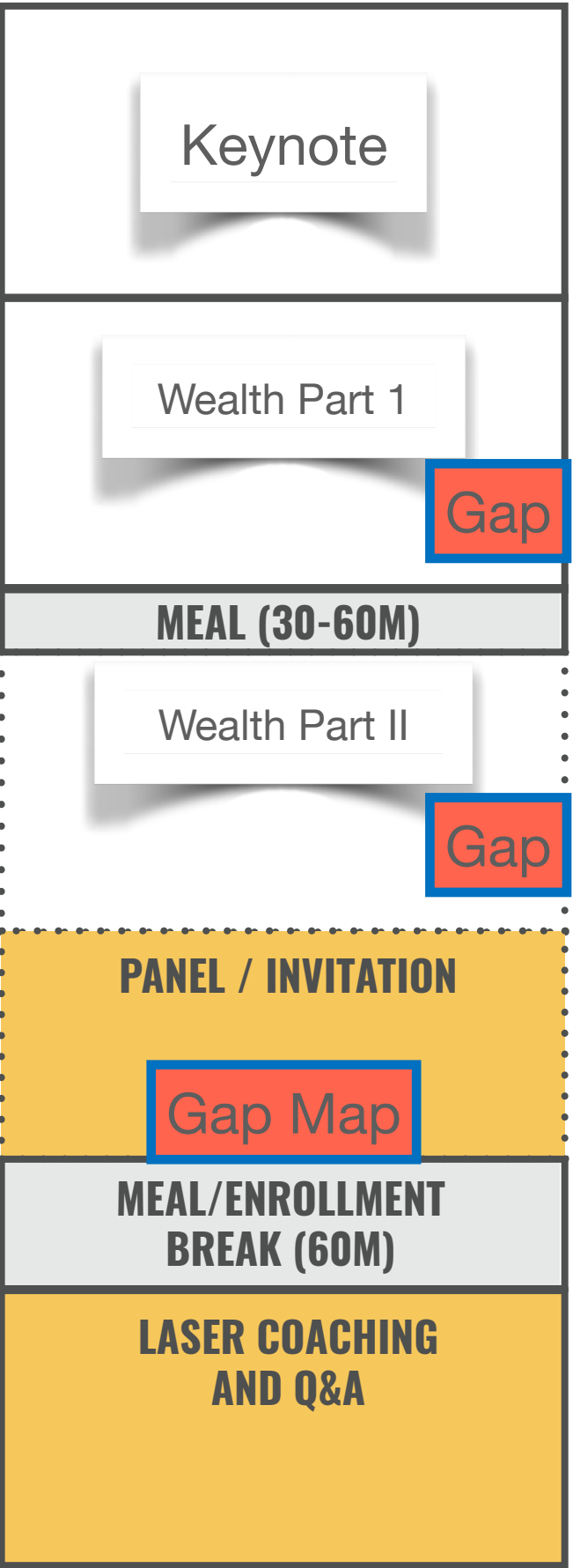
THE SAGE THREE DAY WAY

Event PAG mirrors challenge/product and HTO
Event is the bridge between the two
Guest Faculty to be layered in

Health
DAY 1



Wealth
DAY 2



Happiness
DAY 3



Integrating Team Vision, Decision, Action

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VISION

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Call #1: Jumpstart

- Event Org Chart (Roles and Responsibilities)
- Team Communication
- Event Location
- Event Name (Dashboard URL)
- Event Theme
- Event Bookends (start and end time)
- Pre-Event Communication: Attendee Confirmation Letters
- Date for Marketing Jumpstart
- Logo and Brand Deck (Color, Fonts)

Call #2: Enrollment Strategy

- Big Why Worksheet
- Profit Pyramid
- Offer (New/Renewals)
- Sample Offer Pages
- Enrollment Team Strategy (team, training and coaching zone)

Call #3: Marketing Timeline

- Revenue Generation and Ticket Map
 - Ticket Types
 - Upgrades (VIP)
 - Sponsors
 - Preview Session
- Swag: Wow Box or Flat Swag
 - Address Tracking
 - Review High Level SWAG Vision
- Marketing Timeline: Pre-Event Communication
 - Attendee Confirmation Letters
 - Pre-Event Email Campaign
 - Swag campaign
 - Tech Check Email Campaign
 - Email/Text/Telegram Reminders

Call # 4: PAG Macro (Big Picture)

- Pre-event
 - Tech Check
 - Pre-Event Bonus Day (if applicable)
 - Pre-Event Team Meetings
- 3 x 3 PAG
- Big rocks: Modules and Speakers, VIP Deliverables, Sponsors
- Pebbles: Breakouts, Exercises and Shares
- Sand: Success Panels, MOI's Emcee and Energy Management
- Enrollment: Bonus Q and A, Welcome celebration, renewal, downsells

Filters for Vision:

Big Why

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Raving Fan Deliverables

Non-negotiable

Call #3a Sponsorship: Only if applicable

- Sponsor Revenue Generation
- Sponsorship Packages and Pricing
- Sponsor Confirmation: Contracts and Confirmation letters
- Sponsorship Communication and Sponsor Liaison
- Sponsor Assets & Deadlines: Logos, Ads, etc

Macro Clear... Micro Easy

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Decision

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Call #5: SWAG, Dashboard and Production Design

- Swag Design
 - Wow Box, Flat Swag
 - Samples, Proofs and Ordering Process
 - Timelines and Tracking
- Production Design
 - Stage Design
 - Digital Backdrops and Banners
 - Floral and Props
- Dashboard Design
 - Sample Dashboard
 - Fun-ification (Leaderboard & Point Rewards)
 - Gap Map Analysis & Dashboard Exercises
 - Leaderboard Giveaways & Prizes
 - Design Assets
 - Timeline

Call #6: Budget & SWAG Overview

- Budget Overview
 - Summary
 - Cash Flow
 - SWAG
 - Stage Design
 - Team (Travel & Food)
 - Speakers
 - A/V
 - Miscellaneous Vendors

Call #7: PAG Micro (Refinement)

- Pre-event
 - Tech Check
 - Pre-Event Bonus Day
 - Pre-Event Team Meetings
- Big rocks: Modules and Speakers, VIP Deliverables, Sponsors
- Pebbles: Breakouts, Exercises and Shares
- Sand: Success Panels, MOI's Emcee and Energy Management
- Enrollment: Bonus Q and A, Welcome celebration, renewal, downsell

Call #8: Dashboard Review

- Dashboard URL
- Dashboard Mockup
- Dashboard Buttons: VIP Deliverables, Beneficiary, Sales Page
- Dashboard Ribbons
- Fun-ification & Leaderboard
- Dashboard Welcome Letter
- PDFs & Downloadable Resources
- Gap Map Analysis & Dashboard Exercises (from PAG call prior)
- Tech Check: Media Release: Earnings Disclaimer, Registration Questionnaire, Zoom Digital Backdrops
- Concurrent Sessions/Sponsor Roundtable
 - Titles/Descriptions
 - Fun-ification
 - Logos
 - Resources
- Speaker Assets: Bios/Headshots

Call #9: Enrollment Strategy

- Review Offer and Repitch (New/Renewals)
- Review Offer pages
- Review Success Panel Prep "Lunch"
- Review Welcome Celebration Agenda
- Enrollment Lobby Structure and Schedule
- Housekeeping
- Post Event Follow Up Campaign

Review Offer and Repitch Slides

Review Offer Page

Call #10: Internal Dry Tech

- Team Roles
- Overview of Master Zoom Links
- Team Communication Plan
- Team Cheat Sheet
- Schedule at a Glance
- Help Desk
- Enrollment Support
- Coaching Zone (if applicable)
- Sponsor Roundtable (if applicable)
- VIP, Downsell, Upsell, Renewal (if applicable)
- Fun-ification (Leaderboard & Prizes)

Filters for decision-making:

Does it help or hurt enrollment?

Is it right fit for the budget?

Is it logistically possible?

All Roads Lead to Your HTO

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Action

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Call #11: AV Run of Show

- Review Run of Show
 - Pre-event
 - Team Huddles
 - Onsite Team Arrivals/Sound Tests
 - VIP Activities
 - Zoom Breakouts
 - Fun-ification Announcements
 - Host Preferences
 - Chat On/Off
 - Speaker Timer
 - Cue Song
 - Walk On Song
 - “Voice of God” (VOG)
 - Housekeeping
 - Intros and Outtros
 - Video/AV Assets (Deadlines & Specs)

Call #12: Final Decisions

- Dashboard Finalization
- Swag Timeline
- Email Campaigns, Telegram Posts
- PAG: pre-event and any dangling items
- Pre-Event Budget Review

Call #12a: Sponsor Training (if applicable)

- Event Information & Schedule
- Sponsor Round Table Walk Through
 - Zoom Training
 - Dashboard Preview
- Sponsor Asset Follow-Up
 - Logos & Ads
 - Fun-ification

Call 12b: Speaker Preparation

- Event Information & Schedule
- Speaker Walk Through
 - Zoom Training
 - Schedule sound test, speed test
 - Content Review
 - Context
- Speaker Asset Follow-Up
 - Logos & Bios

Call #12c: Zoom Room Monitor Training

- Event Information & Schedule
- Dashboard Preview
- Obv.io Training
- Review Protocols
 - Communication
 - FAQ Document
 - Zoom Digital Background/Renaming
- Zoom Monitor Huddles
 - Shift Schedule & Assignments

Call #12d: Event Support Team Training

- Event Information & Schedule
- Dashboard Preview
- Obv.io Training
- Review Protocols
 - Communication
 - FAQ Document
 - Zoom Digital Background/Renaming
- Zoom Monitor Huddles
 - Shift Schedule & Assignments

Call #13: Dry Tech and Sales Training ALL hands on deck

- Team At A Glance: Roles, Responsibilities, Communication & Support
- PAG: Audience and Team Schedules
- Tech Check Review
- Help Desk Training
- Chat Support
- Enrollment Training
- Review Dashboard and FAQs

Call #14: Onsite Pre-Event Meeting

- State of the Union
 - Final Registration Numbers
- Schedule
 - 3 x 3 PAG
 - Doors Open:
 - Event Start Time:
 - Bonus Session/s:
- Event Support
 - Recap Communication Plan
 - Recap Roles and Responsibilities
 - Help Desk Overview
 - Enrollment Room Overview
 - Coaching Zone Overview (if applicable)
- Instant Up-levels and Do-Differentlys

Filters for Action-taking:

Big Why

RFC

Raving Fan Deliverables

Non-negotiable

Ideas Into Action

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Post

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Call #15: Post-Con Debrief

- State of Union
 - Enrollment Update
 - Final Beneficiary Donation Amount (if applicable)
 - Sales Updates
- Post Con Debrief : What worked (and let's repeat it!) What can be up-leveled (Do Differently's)
 - Offers, Beneficiary
 - AV/Stage Set
 - Email Campaign, Tech Check
 - Door Opening, Housekeeping
 - Help Desk, Chat
 - Dashboard: Fun-ification, Leaderboard
 - PAG: Content, Networking/Exercises, Breakouts
 - Sponsorship
 - Speakers
 - Team Meetings, Team Training, Team Meals
- Next Steps
 - Budget / receipt reconciliation
 - Chat and Recordings
 - Scheduling next event

Filters for Debriefing:

Does it help or hurt enrollment?

Is it right fit for the budget?

Is it logistically possible?

Instant Upevels, Do Differently's

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**YOU CAN
DO THIS!**

